BEGINNING WITH THE END IN MIND

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TRACKS TO SUCCESS
Many of us volunteer for an E-board position without being aware of all of the responsibilities that come with our commitment. When thinking about transitioning an E-board, it’s important that we are clear about what it is we actually do within our positions in order to better prepare the incoming members.
- A successful way to transfer club knowledge
- Prevent the group from starting over
- Minimize confusion, maximize continuity

IMPORTANCE
President- responsible for preparing an agenda, calling and presiding meetings, signing official documents, appointing committees (if there are any internal), appointing temporary officer if a position becomes vacant. They are like the “face” of the organization and represent it when necessary.

Vice President- responsible for assisting the president with their duties and serving in their place should they need to be absent or if they vacate their position.

Treasurer- responsible for handling all funding which includes disbursement, requests and money management. A monthly report should be kept/tracked.

Secretary- responsible for keeping attendance, recording activities and meetings that take place, and composing the minutes for each meeting. The minutes should be distributed to the group within 72 hours. Also, they should be signed by the president and advisor, and stored for official use if needed. The secretary is also responsible for sending reminders about events/meetings to the group.

Public Relations- responsible for scheduling events, reserving locations and for promotional items & disbursement. This individual may speak on behalf of the organization as well.

Community Service- responsible for finding community service activities for the organization. They should organize all details of these events.

Fundraising- responsible for coming up with and implementing fundraising events/activities for the organization to participate in.

Sergeant of Arms- responsible for keeping track of the constitution, use of Roberts rule of
order and attendance as it relates to membership (if applicable to your organization). This individual also enforces the rules stated in the constitution. All of these positions are not necessary to appoint an individual to, it all depends on what your organization needs to get done. It is sometimes helpful to have more e-board members in order to disperse the commitment and responsibilities. Each position may also look different, depending on the organization, this is simply an example of what a full e-board can look like.
- Start Early!
- Identify potential leaders in your organization
- Develop a mentoring program
- Current F-Board Binders

HOW TO EFFECTIVELY TRANSITION
- Preparation by Outgoing E-Board
- Leadership Binders/USB
- Elections 1 month before installation- overlap/shadowing experience
- Update constitution and E-Board position responsibilities before installation
- Outgoing & Incoming Officers Together
- Transition retreat or meeting
- Introduce new E-Board members to advisor, SA professionals etc.
- Evaluate Transition Plan- how will you know the transition plan worked?
- Recognition & Induction- recognize outgoing and incoming
- Give incoming a responsibility- for practice

SUGGESTED TRANSITION PLAN
Define your role and responsibilities; make sure they reflect your role accurately in your club's constitution

- Assist with room reservations (hold a room for meetings next semester)
- Explain and direct unfinished projects, club traditions, and ideas that were never implemented
- Provide incoming E-board with all necessary files and forms that may help guide events/projects in the future
- Share important contact information and helpful resources
- Discuss challenges faced
- Give advice about what you would have done differently, or share tips (based on experiences) that will help the club be more successful
- Exchange contact information with incoming E-board

OUTGOING RESPONSIBILITIES
- Create a timeline that includes short term and long term goals
- Create an execution plan to achieve these goals
- Recognize what didn’t work in the past and brainstorm a different approach
- Familiarize yourselves with the budget, clubs constitution, and the proper way to complete paperwork
- Create an effective method of communication with all E-board members and Advisors
- Discuss Club Fair preparation on September 9th
- Begin working during the Summer
- Make room reservations for all events early!
- Ask questions!

INCOMING RESPONSIBILITIES
Questions?